GRANTEE CONVENING
RISK. AGILITY. RESILIENCE.
September 7–9, 2016 / Washington, DC

Social Innovation Fund

Thursday, September 8, 2016

9:00 – 10:30 AM	**Opening Plenary Course Correction & Agility** **Session Description:** **Moderator:** **Location:**
10:30 – 10:45 AM	**Break**
10:45 AM – 12:15 PM	**Concurrent Sessions: Course Correction & Agility**

Session One: Advancing Evidence-Based Policy with Pay for Success (PFS)
Session Description: The PFS exploration process drives an orientation to outcomes through connecting data to contracts and decision-making. Jurisdictions face many of the same obstacles in data, resources, etc. as they work through the mechanics of measuring performance and tying payments to performance. During this fast-paced workshop, come ready to share your challenges with implementing evidence-based policy and hear how sub-grantees have addressed similar issues in the PFS framework. Sub-grantees will discuss their progress with integrating evidence-based initiatives and Third Sector will share its strategies to align the priorities of governments and providers. Applying lessons and solutions learned from the field can, and should, accelerate the transition to evidence-based policy.
Facilitators: Celeste Richie
Location:

Session Two: Checking the Side Mirrors
Session Description: Exploring a complex Pay-For-Success project requires continually adapting to new and changing conditions to design a model that succeeds in attracting investment while best benefitting families being served. GHHI and Partners will present a series of lessons-learned for "checking the side mirrors". PFS project partners cannot rely on the "rear view mirror" for deep reflection back on evaluation results but instead must conduct ongoing adaptive "lane changes" to continue to move the project ahead. GHHI and Partners will present live examples and lessons-learned for "checking the side mirrors" including building new relationships across siloes, tinkering with successful program design, and launching into a pilot as a 'road test'. The Session includes an interactive break-out component in which participants will consider their biggest adaptive challenges and complete a template, based on the lessons-learned, for prioritizing actions to monitor need for and conduct needed 'mid-course corrections'.
Facilitators: Michael McKnight
Location:

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Session Three: Creating a Subgrantee Learning Environment to Increase Impact

Session Description: To borrow loosely from an African proverb, "If you want to fail fast, go alone; if you want to go far, go together." From in-person meetings to technology-driven group discussions, we'll explore techniques and tools to ensure you and your subgrantees are consistently sharing insight with one another to improve their programs. Our learning environment framework will help all types of intermediaries whether they have a network of subgrantees across the nation or those that have a cohort of subgrantees around a single geographic focus area. In addition, we'll help you overcome the challenges encountered by subgrantees that may face capacity constraints that prevent their engagement in a learning and sharing environment and how their productivity and impact can go far when they go together.

Facilitators: Marc McDonald

Location:

Session Four: Disruption Driving Impact: How the SIF is shifting "business as usual" in early education

Session Description: Mile High United Way (MHUW), Silicon Valley Community Foundation (SVCF), and United Way for Southeastern Michigan (UWSEM) are each engaging the SIF with the goal of improving early literacy and school readiness. This session will examine our efforts at disrupting "business as usual" within our early childhood education systems at multiple levels. We will use three focus areas (1) targeting parents, caregivers, and professionals to drive child-level outcomes, (2) summer programming to reinforce early childhood interventions and (3) collective impact approaches to systems change to provide concrete examples of how organizations can be successful in driving the disruptions necessary to make significant, positive changes for children and families. Examples of both the challenges and opportunities these disruptions afforded will be examined. The session will close with a discussion of the types of system-level disruptions and integrations that have occurred to support and sustain the organizational shifts in practice.

Facilitators: Jeffery Miles

Location:

Session Five: **Stay the course (and correct along the way): Pay for Success in Denver**

Session Description: Denver PFS project providing housing and supportive services to at least 250 homeless individuals who frequently use the city's emergency services successfully closed in early 2016. Through the process of structuring the project, several key challenges led the project team "back to the drawing board" to create innovative solutions and re-shape various project components to move forward towards a finalized project with partners. This session provides an overview of the project as well as specific program

elements that shifted during the transaction structuring phase and how project partners arrived at the solutions that kept the project moving forward. The session will also include a summary of how the need for course correction is addressed now that the program is operational.

Facilitators: Annie Bacci

Location:

Session Six: Time to Pivot – Integrating Trauma-Responsive Services into Opportunity Pathways for Youth

Session Description: Recent research and emerging innovations in practice are signaling that opportunity pathways for vulnerable youth can be more attentive to adolescent brain development and the trauma-related needs of young people. Systems and practitioners that interact with youth, particularly youth in transition from foster care or involved in the justice system, need to have a solid understanding of trauma and how caring adults can help youth build resilience and succeed. This session will bring together researchers on adolescent brain development and trauma-informed practitioners to share learnings from new research and practice so that we and others might integrate these ideas into opportunity programming for youth. The Annie E. Casey Foundation, with its partners from the Jim Casey Youth Opportunities Initiative and LEAP SIF practitioners in the field, will host an interactive dialogue focused on how to promote awareness and adoption of these ideas in your community.

Facilitators: Partice Cromwell

12:15 – 1:00 PM	**Networking** **Location:**
1:00 – 2:15 PM	**Risk & Field Disruption Working Lunch** **Session Description:** **Location:**
2:15 – 3:45 PM	**Concurrent Sessions: Risk & Field Disruption** **Session One: Beyond the Deal…The community and organizational benefits of participating in a PFS feasibility analysis** **Session Description:** The presenters in this session represent organizations that have deep experience leading communities and service provider organizations through PFS feasibility. While the theories of change and mechanics of PFS feasibility vary between the intermediary organizations represented, each has developed a growing and rich catalog of "but for" status quo disruptions. These are instances where the very process of exploring PFS feasibility resulted in positive status quo disruption within a governmental or service

provider organization, a disruption that would not have occurred but for the PFS feasibility work.

The University of Utah's Sorenson Impact Center will facilitate this presentation of PFS feasibility-generated status quo disruptions that span issue areas and geographies. The presentations will focus on the SIF and non-SIF PFS feasibility work of the Center, Corporation for Supportive Housing, Institute for Child Success, National Council on Crime and Delinquency, and Harvard Kennedy's Government Performance Lab.

Facilitators: Kerri Nakamura

Location:

Session Two: Connections to Care – Transforming Mental Health Access and Service Delivery in NYC

Session Description: Connections to Care (C2C) seeks to strengthen and transform the way mental health services are accessed by and delivered to New York City's most vulnerable individuals. C2C aims to do this by building the capacity of social service organizations to better meet the mental health needs of the low-income individuals they already serve— meeting New York City's most vulnerable where they are already accessing services.

Facilitators: Amu Ptah

Location:

Session Three: Consumer-Oriented Services: How to be inclusive and responsive to consumers

Session Description: Service providers must be intentional, consumer-oriented, user-oriented, and balanced in terms of being relational and transactional while engaging with consumers. This session will engage SIF intermediaries in a discussion about how they and their subgrantees engage their communities in consumer-oriented and culturally relevant ways and the lessons they have learned in the process.

Facilitators: Santiago Garcia

Location:

Session Four: Outcomes Based Financing in Place-Based, Early Childhood Initiatives

Session Description: Children's environments can significantly influence educational and health outcomes. Inadequacy and instability put children at greater risk of poor academic, social, and economic outcomes, but there are unanswered questions on how a child's social determinants of health—the conditions that influence well-being and quality of life— influence brain development and long term outcomes. Increased understanding of the interconnectedness of these factors will inform policy, urban planning, and design that better supports population health and well-being.

We must think collectively and systemically to improve outcomes for vulnerable children and their families. We hypothesize that it is possible to use Pay for Success or other outcomes based financing to scale the continuum of high quality early childhood interventions within the context of place-based initiatives. It is critical to learn and share at the nexus of early childhood development, place-based efforts and Pay for Success financing. This panel aims to do just that.
Facilitators: Megan Golden
Location:

Session Five: Paving a Path for PFS in Healthcare
Session Description: By 2024, $1 in every $5 spent in the U.S. will be on healthcare. With almost half of that spending projected to be done by federal, state, and local governments, it is more important than ever that they innovate and scale programs that work. Delivery and payment reform efforts are well underway in multiple states, but Pay for Success has not yet been formally integrated into healthcare policies and practices. In this interactive session, participants will hear from the Robert Wood Johnson Foundation, Green & Healthy Homes Initiative, and Social Finance on the importance of PFS to the healthcare field and on their progress to date working with federal and state Medicaid offices as well as Medicaid health plans around how to successfully implement PFS. Together, presenters and all participants will dive into the specific challenges of healthcare PFS projects, particularly those involving Medicaid, and discuss pragmatic solutions to take to healthcare policymakers to fully unlock the potential of PFS in healthcare.
Facilitators: Trent Van Alfen
Location:

Session Six: Risk and Reward in Collective Philanthropy
Session Description: Moving the needle in communities requires collective action, including collective philanthropy. Learn how United Way of Greenville County and other grantmakers developed innovative funding strategies to meet SIF match requirements and plan for long term sustainability of the OnTrack Greenville initiative. Take home ideas and tools to use in your community.
Facilitators: Tobi Kinsell
Location:

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Session Seven: **Transition Coaching: An Intrusive Community-Based Approach to Fostering Postsecondary Success**

Session Description: Too many students stumble on the way through college, stumped by personal, financial, or administrative challenges. Boston Coaching For Completion—the one-on-one transition coaching at the core of the city's larger college completion initiative—is filling a critical gap in student support needs through an innovative model based on cross-sector collaborations with community-based organizations, colleges, and universities. Early evidence shows that coaching is working; its recent three-fold expansion documents strong student appetite for it. Yet, in our collective efforts to grow the program and make it resilient, challenges are inevitable, but so are opportunities. This session will foster a deep conversation between partners in this work about the value of transition coaching and the challenges and opportunities that come with sustaining it at a large scale—especially in a post-SIF environment.

Facilitators: Eric Esteves

Location:

3:45 – 4:00 PM	**Break**
4:30 – 5:30 PM	**Networking**
	Session Description:

Friday, September 9, 2016

9:00 AM – 10:30 PM	**Plenary Session Risk with Responsibility**
	Session Description:
	Facilitators:
	Location:
10:30 – 10:45 AM	**Break**
10:45 AM – 12:15 PM	**Concurrent Sessions: Risk with Responsibility**
	Session One: Common Outcomes Common Indicators: Comparing apples and oranges to show portfolio-wide impact
	Session Description: This session will provide a critical look at how local conditions necessitated letting go of plans to use a promising cross-partner evaluation tool (the EDI), and prompted a mid-project course correction for the United Way for Southeastern Michigan's portfolio evaluation. It will examine how a new set of common outcomes and common indicators (COCI) was selected and will review analytical approach being used to show our portfolio's impact around these outcomes. Specific examples of how our COCI and new portfolio analysis (minimum detectable effect) is supported by our existing subgrantee SEPs will be included. The interactive session will close with an examination of what the

impacts have been on our organization's ability to better plan and adapt to similar evaluation challenges.

Facilitators: Jeffery Miles

Location:

Session Two: Maximizing Impact and Minimizing Risk: Subgrantee Planning and Monitoring

Session Description: The effectiveness of your subgrantee management is only as good as your subgrantee policies and procedures and your ability to actually follow your established protocols. In this session, we'll identify the four major phases of subgrantee management – internal guideline development, selection, monitoring and close out – and focus on the preparation your organization needs to have in place with each of these phases. We'll detail how you can (and why you should) establish subgrantee policy and procedures before you even select the subgrantees; we'll share policies, procedures and monitoring tools; and we'll incorporate feedback from the audience to identify best practices. Whether you just received your first Social Innovation Fund award or you are a seasoned SIF intermediary, this session will identify new ways you can minimize risk (internally and externally) to focus on maximizing impact with your subgrantees.

Facilitators: Marc McDonald

Location:

Session Three: Playing the Long Game on a Complex and Changing Field: Sustaining Innovation

Session Description: Healthcare innovations are often well-known before payment mechanisms to support them are established. Primary care clinics, especially those serving low-income patients, need support developing and implementing financial sustainability plans for healthcare innovations not supported by Medicaid and other funders. This is especially true in rural areas where health disparities are exaggerated and where clinics often have fewer funding sources.

As part of the IMPACT initiative to disseminate evidence-based behavioral health services into community primary care, the AIMS Center implemented a multi-prong technical assistance program to help rural clinics develop customized financial sustainability plans to sustain care at the end of SIF funding. Clinics received support across multiple domains, including clinical productivity, contracting with payers, credentialing behavioral health providers, coding and claims, among others.

The first cohort of clinics (n=5) completed their grants in June. Data was collected before and after financial sustainability support and this data will be presented.

Facilitators: Virna Little
Location:

12:15 – 1:30 PM	**Technology to Scale Change and Increase Impact Working Lunch** **Session Description:** **Facilitators:** **Location:**
1:30 – 2:45 PM	**Networking** **Session Description:** **Facilitators:** **Location:**
2:45 – 3:00 PM	**Break**
3:00 – 4:30 PM	**Concurrent Sessions: Technology to Scale Change and Increase Impact**

Session One: Data Sharing to Advance a Common Agenda
Session Description: The goal of any collaboration is to accomplish something together that you couldn't accomplish alone. The Sí Texas project tracks shared metrics, although each subgrantee's approach to reaching those goals is different.   We will explore various approaches to data sharing (HIE, cloud databases, etc.) that allow subgrantees to track clients across multiple providers, solve problems collaboratively, and get credit for their unique roles. Data sharing not only supports a collective impact evaluation, but helps subgrantees scale their work in a collaborative manner, and positions them to capture additional funding streams for sustainability. This session will focus on (a) How data sharing can build capacity and sustainability; and (b) challenges, lessons learned, and tips for any intermediary wishing to take this approach.
Facilitators: Anne Conner
Location:

Session Two: GIGO is a No Go: Ensuring Quality in your Data Management System
Session Description: Without data, most of our programs will not get funded as they cannot be measured. As a result, significant investment is made into data systems to capture information that can be analyzed and shared. But, how do you ensure you and your subgrantees are entering data correctly and timely? The session will highlight tools and processes to maintain accurate data and will review a critical component to keep data accurate – demonstrating its value to the subgrantee. By engaging the subgrantee throughout the process and providing the subgrantee with useful and actionable data analysis, the subgrantees are more invested in the entire data management process. After this session you'll have the skills and tools necessary to prevent your worst case data scenario: garbage in, garbage out.

Facilitators: Marc McDonald
Location:

Session Three: Using Technology to Track Service Provider Performance
Session Description: We all understand why service providers should deliver outcomes effectively and efficiently. When it comes to how, the devil is in the data.

This session will demonstrate to audience members two examples of how GHHI and its service recipients use technology to track service provider performance in real-time against pre-determined targets. Presenters will not only demonstrate how these systems work, but explain the details behind how each was set up, piloted, and maintained. This session should be attractive to a wide range of SIF grantees and subgrantees who are interested in learning about different ways in which service providers can use technology to enhance service delivery.
Facilitators: Kevin Chan
Location:

4:30 – 5:00	**Closing Remarks**

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